8. Auditron Administration

The machine is equipped with an *Auditron* feature that enables you to manage the copier functions of the machine by controlling the access to the machine, establishing user accounts, and tracking the copy usage per account.

The system is ideal for a work environment that needs to control access or to capture the copy count information. The Auditron only provides copy management capability to copies made at the machine.

This chapter provides you the means to set up and to manage an Auditron system. This includes:

- Establishing user accounts to provide access control and authorization for individuals or groups.
- Establishing general accounts to allow more than one authorized user to charge usage to specific clients or projects.
- Changing the password that allows access to the Auditron setup features or *Tools*.

When the Internal Auditron is used, the copies that are made are charged to the User or General Account that was active when the originals were scanned.

If you are using an external copy tracking device refer to page 10-25 for instructions about connecting an external accounting device to the Document Centre.
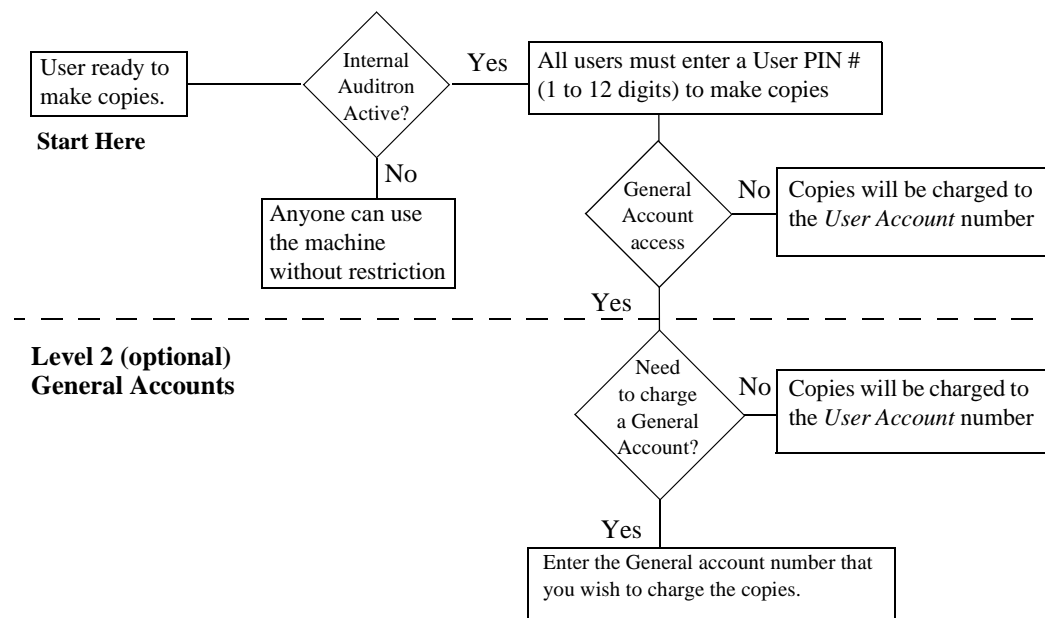
Commonly Changed Setting

What is the Auditron

The Auditron is an optional usage and control system that allows you to control copier access and track copy usage per account.

The Document Centre Auditron system is a two-level system.

1. **User Accounts:** This is a top level account which requires a 1- to 12-digit Personal Identification Number (PIN) to use the copying functions of the machine. Copies made are charged to a User Account. This information can be retrieved later.

2. **General Accounts:** This is an optional second layer of accounts which require an additional 4-digit account number be entered. If this layer is used, the copies will be charged to the General Account rather than the User Account. Users with access to the General Accounts can access *all* the General Accounts.

Level 1
User Accounts

Auditron Illustration

User ready to make copies.

Start Here

Internal Auditron Active?

Yes → All users must enter a User PIN # (1 to 12 digits) to make copies

No → Anyone can use the machine without restriction

General Account access

No → Copies will be charged to the *User Account* number

Yes

Level 2 (optional)
General Accounts

Need to charge a General Account?

No → Copies will be charged to the *User Account* number

Yes

Enter the General account number that you wish to charge the copies.

Planning an Auditron System

Determine your objectives for the Auditron System. Are they primarily to control access, to record usage information, or a combination of both?

Determine the number of machines that you want to incorporate into your Auditron System. Each individual Document Centre must be set up with the appropriate account information.

Decide if you want to have only User Accounts or both User and General Accounts. Remember, a User Account PIN must always be entered to access a General Account.

Determine the Number of User Accounts

The User Accounts can represent individuals or work groups. These accounts provide access to the machine copy features and track the usage.

Develop a matrix, such as the one below, to help you visualize the overall Auditron System.

Auditron System Matrix Example

User	User Account Number	User PIN Up to 12 digits	Tools Access	Auditron Administrator Access	Copy Limit	General Account Access
Machine Administrator	1	22489	Y*	Y*	No	Y*
Finance	2	0390	N	N	No	Y
User #1	3	23400	Y	Y	200	Y
User #2	4	4376	N	N	7,500	Y
User #3	5	6596	N	N	2,700	N
User #4	6	8784	N	N	5,000	N
Project #1	7	428	N	N	5,000	N
Continue with the matrix until all the required User Accounts have been assigned. *User Account 1 must always have *Tools* and Administrator access.						

Determining if General Accounts are needed

If your organization needs an additional level to track the copy usage determine the number of General Accounts required. The additional layer is useful to track copy counts for shared special projects or clients that can be charged by more than one user.

Develop a matrix that identifies the General Accounts and their purpose; for example, General Account #1 is copy information for client XYZ.

General Account Number	Purpose
1	Client XYZ
2	Client ABC
3	Special Project #1
4	Special Project #2
Complete the matrix with all the required General Accounts identified.	

Each account PIN number uses a portion of memory, with User Accounts requiring more memory than a General Account. The table below shows some of the possible User and General Account combinations.

User Account and General Account Combinations

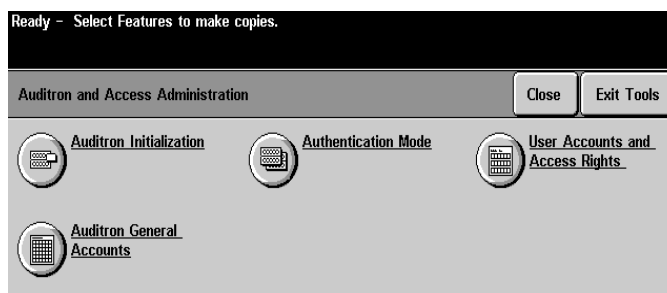| User Accounts	General Accounts
1	2453
500	125
526	0

The more User Accounts you have, the fewer General Accounts will be available.

Setting up your Auditron System

How to get here

Tools Screen 1
☞ **Auditron and Access Administration**

Ready - Select Features to make copies.

Auditron and Access Administration | Close | Exit Tools

Auditron Initialization

Authentication Mode

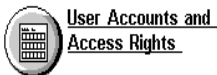User Accounts and Access Rights

Auditron General Accounts

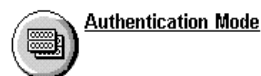After you have determined your Auditron Requirements, it is time initialize and program your Auditron System. Detailed descriptions of each of the screens are found on the following pages.

To Implement the Auditron System
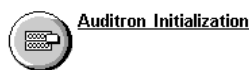
Auditron Initialization

1. Open the *Auditron Initialization* Screen and enter the number of User Accounts you identified on your planning matrix. The Document Centre will automatically determine the number of General Accounts that will be made available. Press Auditron Initialization to prepare the Document Centre to clear the memory and allow the device to accept new information.

User Accounts and Access Rights

2. Open the *User Accounts and Access Rights* Screen. This is the location where you will enter all the User Account information, including PIN numbers and access rights to *Tools*, *Auditron Administrator*, and the *General Accounts*.

Authentication Mode

3. After all the programming is complete, open the *Authentication Mode* Screen and enable the internal Auditron. This will now require users to enter a PIN number to gain access to the copy features.

You should also change the password of the Machine Administrator Account. Detailed instructions are found on page 8-7.

Retrieving Data and other considerations

Set up a system to manage data retrievals. Data can be retrieved manually or, using special software, downloaded into a personal computer.

The Personal Learning CD included with your documentation contains software that enables account information to be downloaded into a database, which can then be converted as required.

Please refer to the *Readme.doc* file on the CD for detailed information and additional instructions. Click *setup.exe* to install the software. The software program is called *rpttool.exe*.

The software can be obtained by containing your Xerox Sales representative or by calling 1-800 828-5881. Ask for the Document Centre Auditron Report Software.

Assign a Backup Auditron Administrator.

Is someone available to serve as a backup for the Auditron Administrator? This individual should be identified and trained by the primary Auditron Administrator to manage the system when required. The User Account assigned to the backup Administrator should be given Administrator rights.

Prevent unauthorized use of the Copier.

How critical is security in your environment? Avoid common PINs and sequences such as 1234, 9999. Use up to 12 digits for User Accounts. Remember, anyone with General Account access can make copies that are charged to ANY of the General Accounts. Also, anyone can press a series of digits to try to gain access to the machine.

For security purposes, if three incorrect PIN entries are made within 1 minute, further entries will be prevented for 3 minutes.
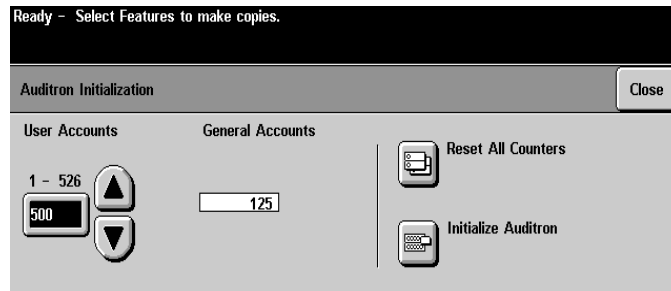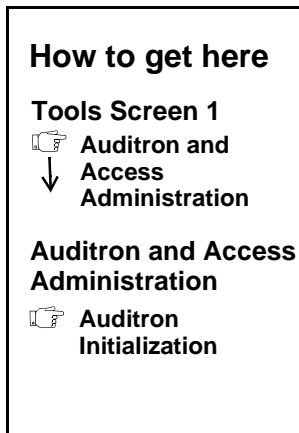
Change the Tools password

It is strongly recommended that you change the password that initially comes with the machine (1111). Follow these steps to change the password.

1. Select *Access* and enter **Tools** using the default password, 1111.

2. Press **Auditron Administration**.

3. Go to User Account 1, verify that the PIN number is 1111. Use the scroll bars if necessary. Account 1 is the Machine Administrator account.

4. Select the PIN field by touching the PIN area. When the background is black the new PIN can be entered. Use the keypad to enter a new PIN number. Record the PIN number.

5. Press the **Close** button.

6. Exit **Tools.**

7. Validate the new password by re-entering *Tools,* using the new password. If you are not successful, contact the Welcome Center.

NOTE   The default PIN for User Account 1 is 1111. It is reserved for Account 1 and cannot be assigned as a PIN for any other account.

Auditron Initialization

Ready – Select Features to make copies.

Auditron Initialization   Close

User Accounts   General Accounts   Reset All Counters

1 – 526   125   Initialize Auditron

500

There are three options on this screen.

User Accounts. Use the scroll buttons to increase or decrease the number of User Accounts or enter a number via the keypad. The number of User Accounts entered will automatically determine the number of General Accounts. The more user accounts that are created, the fewer General Accounts will be created.

If the number of accounts has been modified and the *Close* button is selected, a pop-up screen will appear with two options; begin the initialization process or cancel. If cancel is selected, the number of accounts will be restored to the original values, and the confirmation screen and initialization screen will be closed.

Reset all account counters. *Reset All Counters* resets the account counters to zero for all User and General Accounts and will leave Auditron programming intact.

Initialize Auditron. When this is selected, all existing Auditron data and programming will be erased, and the *Tools* access PIN will be reset to 1111.

NOTE

Selecting *Initialize Auditron* will *always* produce a confirmation screen. If *OK* is selected twice, the Auditron will be initialized, and all the existing programming and the account data will be deleted.

Authentication Mode

This activates the correct Auditron System, if any, for the machine.

None

This is the default selection. There are no copy restrictions.

Internal Auditron

When the Internal Auditron is active, users will be required to enter a valid user PIN number to gain access to the Copy Features functions. The Job Status and Machine Status functions do not require login.

login required

No login required
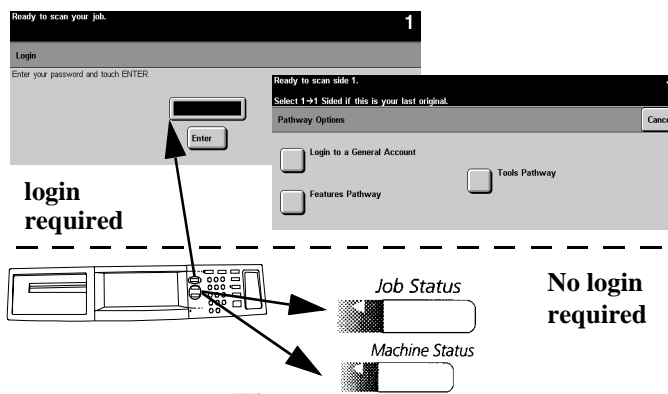
External Auditron

This allows you to connect an External Auditron device. Simply select this option and follow the instructions that accompany the device. See page 10-25 for additional information.

User Accounts and Access Rights

This screen allows you to assign the User Account *PIN numbers*, the *copy limits*, and the *access rights*. You can also view the number of copies made and reset the account copy counter.

To create or modify an account, enter the account numbers, using the keypad directly, by scrolling or by pressing the *Next Active Account* (a user PIN is assigned), *Next Open Account* (a user PIN is not assigned), or *Previous Account* (last account selected) buttons. When the end of the list is reached the first account will be displayed.

User Numbers (PIN) can be 1-12 digits in length with leading zeros recognized. *Account Limit* is the maximum number of copies allowed for the currently displayed account. This figure ranges from 0 to 16,000,000. The *Total Copies* counter displays the total copy count for the selected account.

Reset Counter resets the total copies count for the current account to zero.

Press the **Access** button to display the *Access Rights* screen. This is where you provide account access to the General Accounts, the Machine Administrator or the Auditron Administrator functions.

The system will ensure that Account 1 will always be given both the Machine Administrator and the Electronic Auditron Administrator rights.

Typically, 1-3 people normally have the access rights to the Machine Administration and the Electronic Auditron Administration.
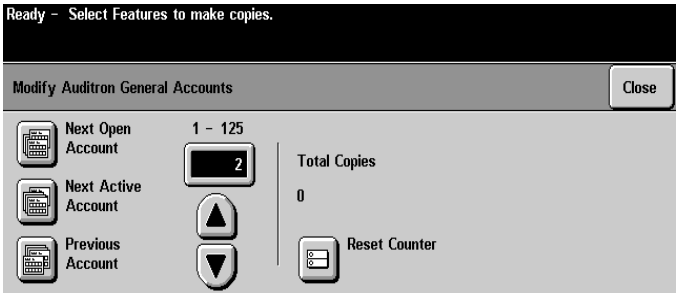
Auditron General Accounts

How to get here

Tools Screen 1
☞ **Auditron and Access Administration**
↓

Auditron and Access Administration
☞ **Auditron General Accounts**

Ready – Select Features to make copies.

Modify Auditron General Accounts   Close

Next Open Account   1 – 125
Next Active Account   Total Copies
                              2   0
Previous Account   Reset Counter

This screen allows you to view and/or reset the copy counters for an individual General Account.

Enter the account number directly, using the keypad, by scrolling, or by pressing the **Next Open Account**, the **Next Active Account** or the **Previous Account** buttons.

The *Next Active Account* button allows you to jump to the next account in the list that has a recorded copy count.

The *Next Open Account* button allows you to jump to the next account in the list that has no copies recorded. In both cases, if the end of the list is reached, the list will wrap around to the first account.

The *Previous Account* button displays the previous account that was selected.

The *Total Copies* counter displays the total current copy count for the selected account.

Reset Counter resets the copy count to zero for the currently selected account. A confirmation window will be displayed to verify this selection.

NOTE   Unlike User Accounts, there is no upper limit to the number of copies that can be charged to a General Account.

Notes